

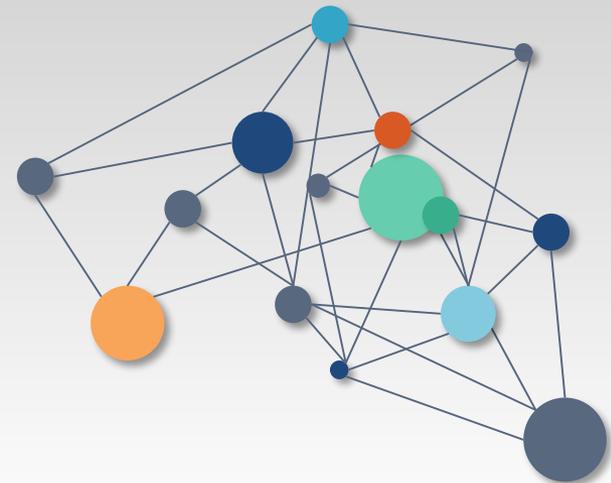
Utah Strategic Planning Interim Progress Report

April 3, 2019

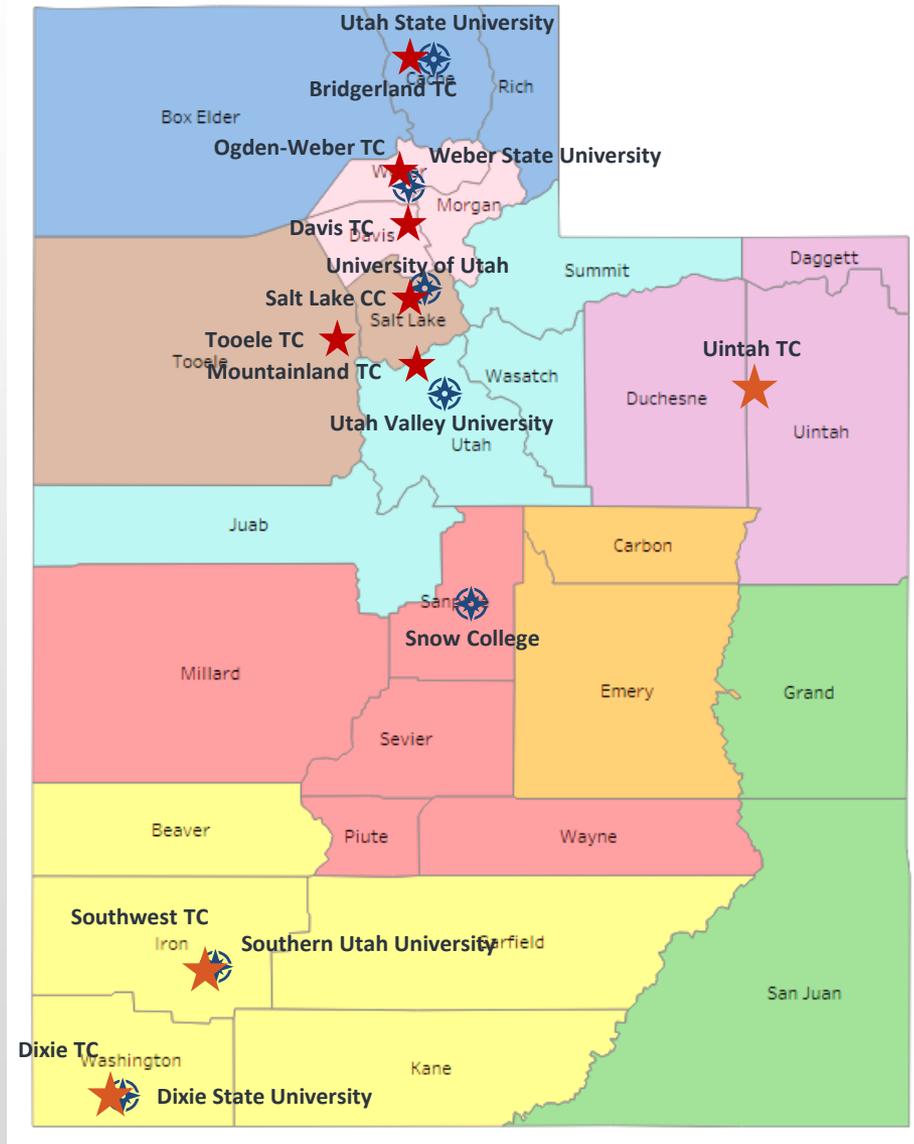


National Center for Higher Education
Management Systems

nchems.org • higheredinfo.org



Utah's Public 4-Year and USTC



 Public 4-Year

USTC

 Public 2-Year

 Public Less than 2-Year



Comparing Utah with Nations and Other States in the Percentage of Young Adult Degree Attainment (Ages 25-34)

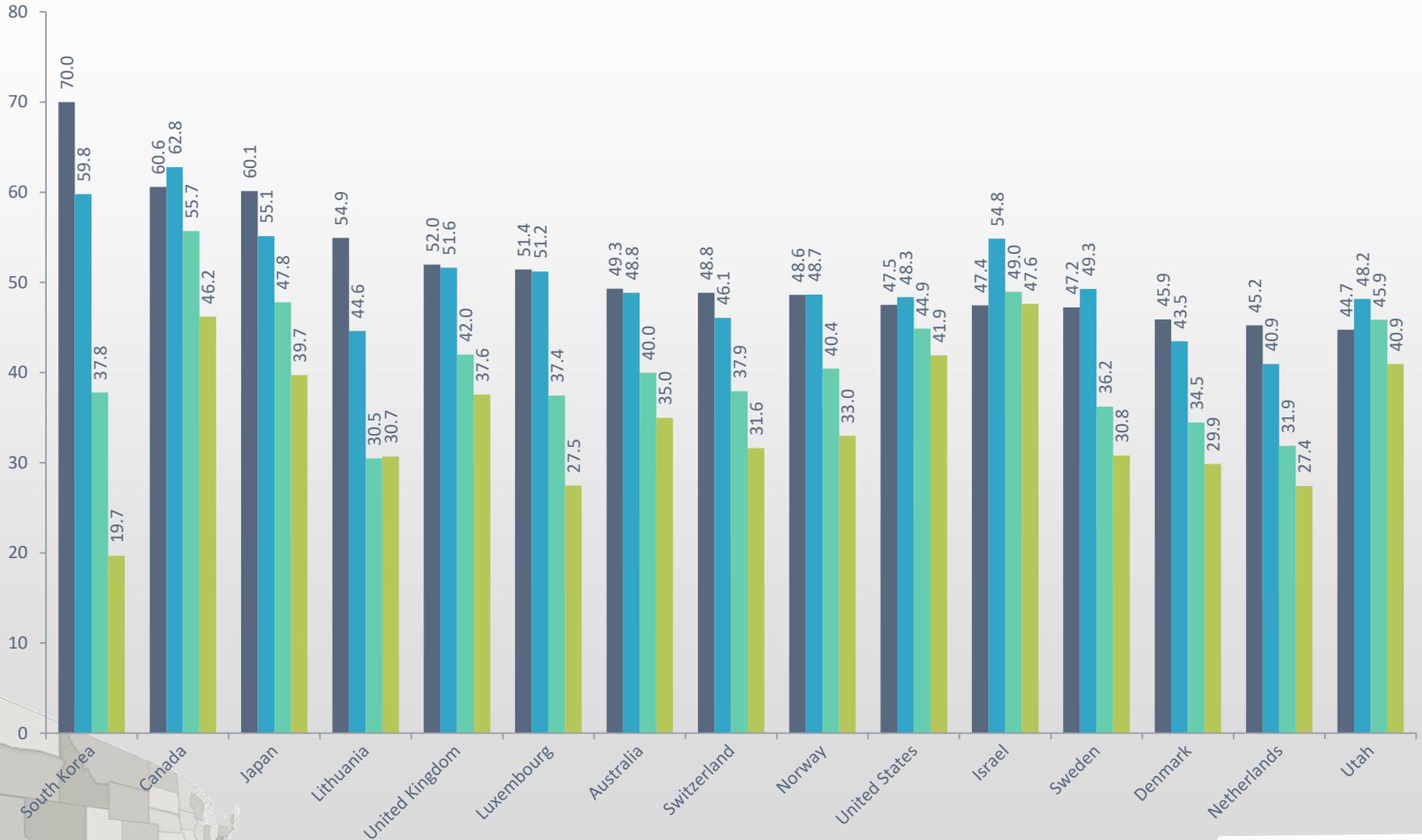


Source: 2017 OECD Education at a Glance (for year 2016); 2016 American Community Survey



Percent of Adults with an Associate Degree or Higher by Age Group – U.S., Utah & Leading OECD Countries

■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64



Source: OECD, Education at a Glance 2017 (for 2016), 2017 American Community Survey 1-Year Public Use Microdata Sample.



Utah's Attainment Goal

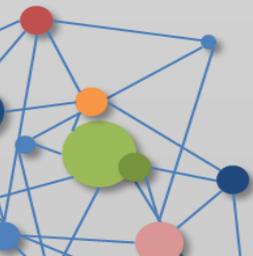
**66% of 25-64 year-olds have
a degree or credential by 2025**

Should this goal be revisited as part of the commission's work?

- Reaffirm?
- Establish sub-goals
 - Baccalaureate & higher
 - Sub-baccalaureate
 - 2025-2030



Student Flow Model Demonstration



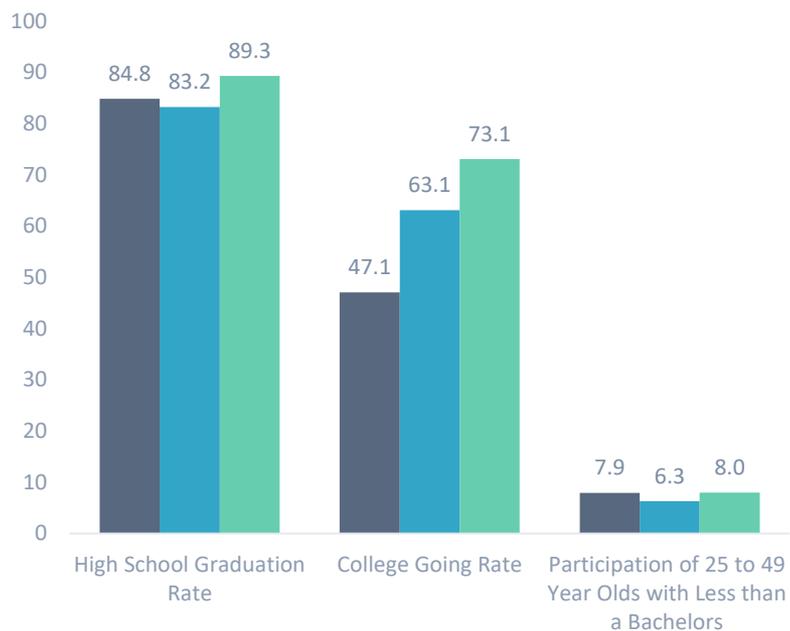
High School Graduation, College Participation, & Completion, 2015-16

■ Utah

■ US Average

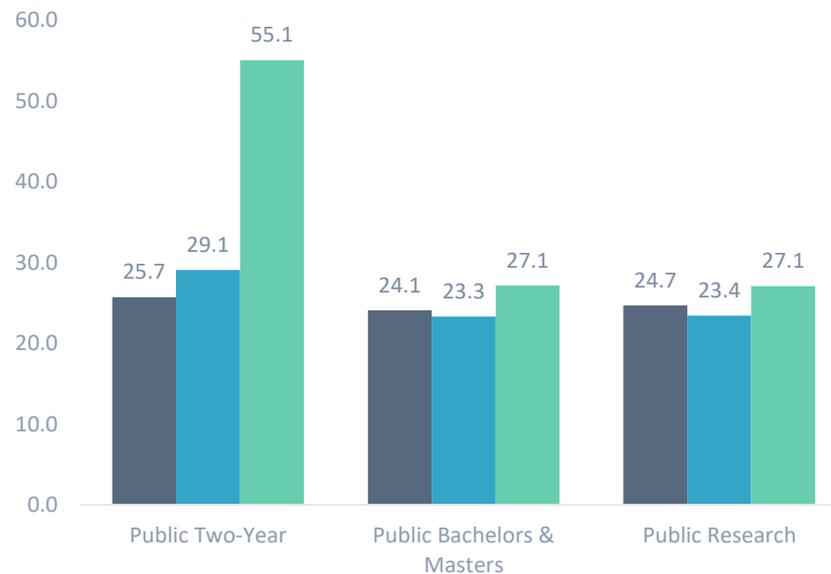
■ Median, Top 5 States

Input Rates



Throughput Rates

Undergraduate Credentials and Degrees Awarded per 100 FTE Undergraduates

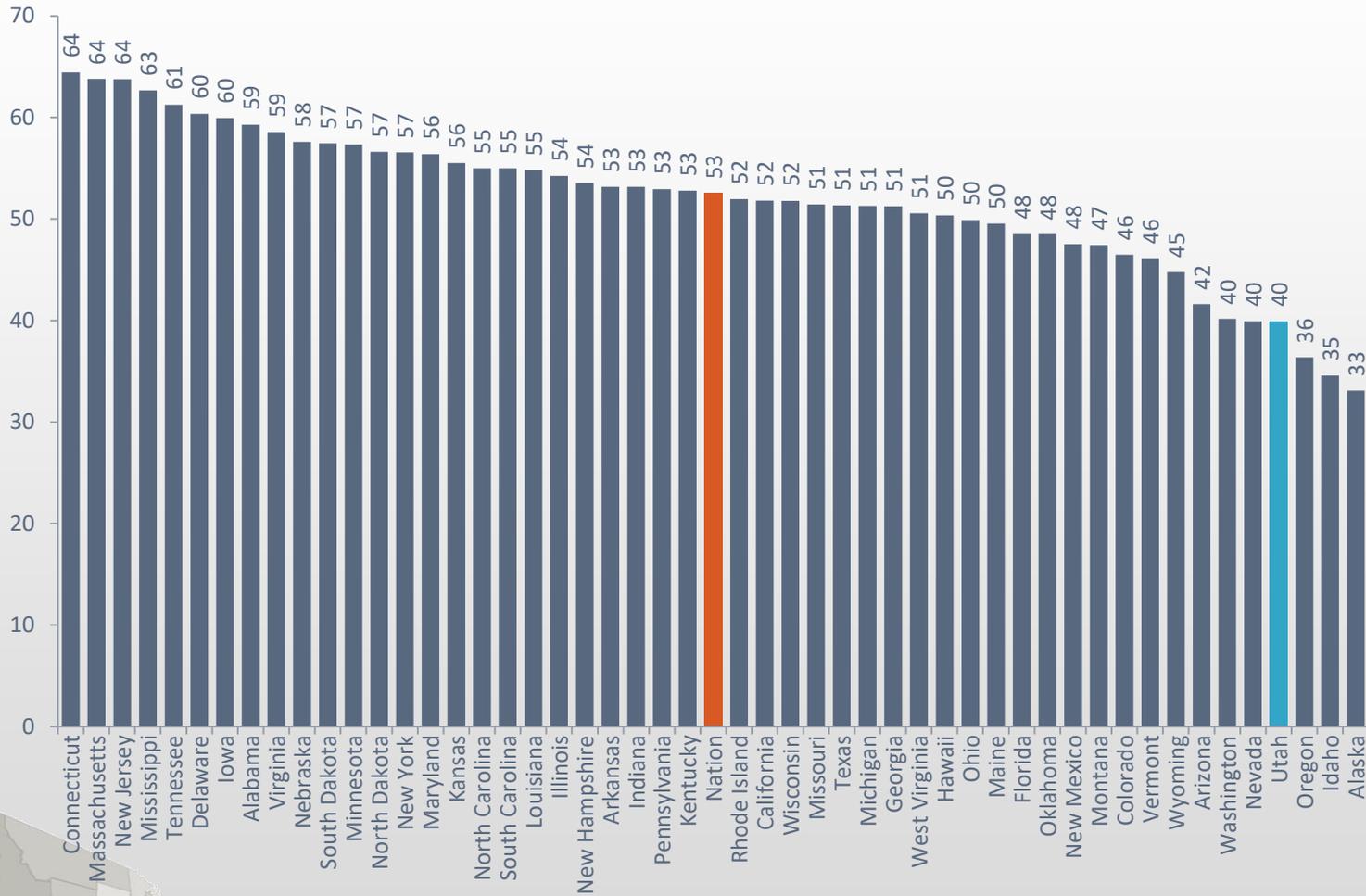


Sources: Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2016. NCES, IPEDS Fall 2016 Residency and Migration File; ef2016c Provisional Release Data File. *High School Graduation Rate*: NCES Table 219.46. Public high school 4-year adjusted cohort graduation rate (ACGR), by selected student characteristics and state: 2010-11 through 2014-15; *Undergraduate Awards*: NCES, IPEDS 2015-16 Completions File; c2016_a Provisional Release Data File. NCES, IPEDS 2015-16 Instructional Activity File; efi2016 Provisional Release Data File. *College Going Rates: Enrollment of Adults*: NCES, IPEDS Fall 2015 Enrollment File; ef2015b Provisional Release Data File. U.S. Census Bureau, 2015 American Community Survey One-Year Public Use Microdata Sample.



Student Pipeline, 2016

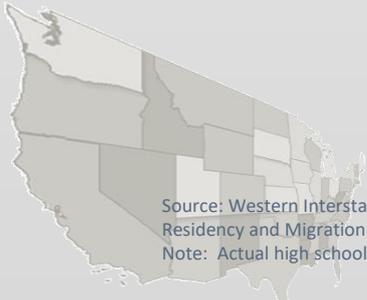
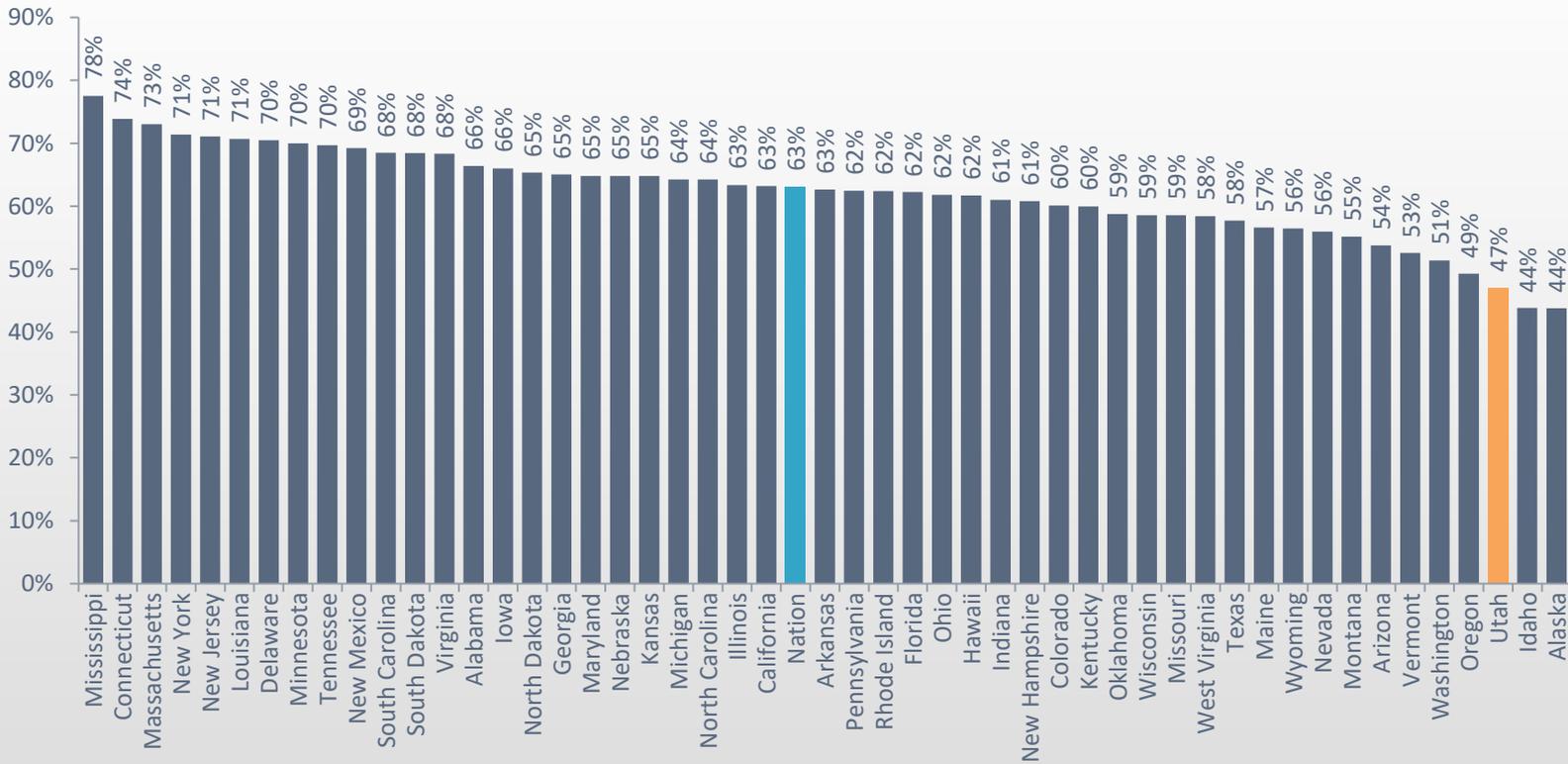
For every 100 9th graders, how many enter college?



Sources: U.S. Department of Education, Office of Elementary and Secondary Education, Consolidated State Performance Report, 2014–15. See Digest of Education Statistics 2016, table 219.46; WICHE, Knocking at the College Door: Projections of High School Graduates, 2016 (Extraction 12-28-16); NCES, IPEDS Fall 2016 Residence & Migration Enrollment File; ef2016_c Provisional Release Data File. NCES, IPEDS Fall 2016 Retention Rate File; ef2016_d Provisional Release Data File. NCES, IPEDS 2015-16 Graduation Rate File; gr2016 Provisional Release Data File.



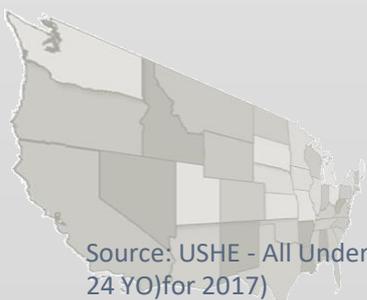
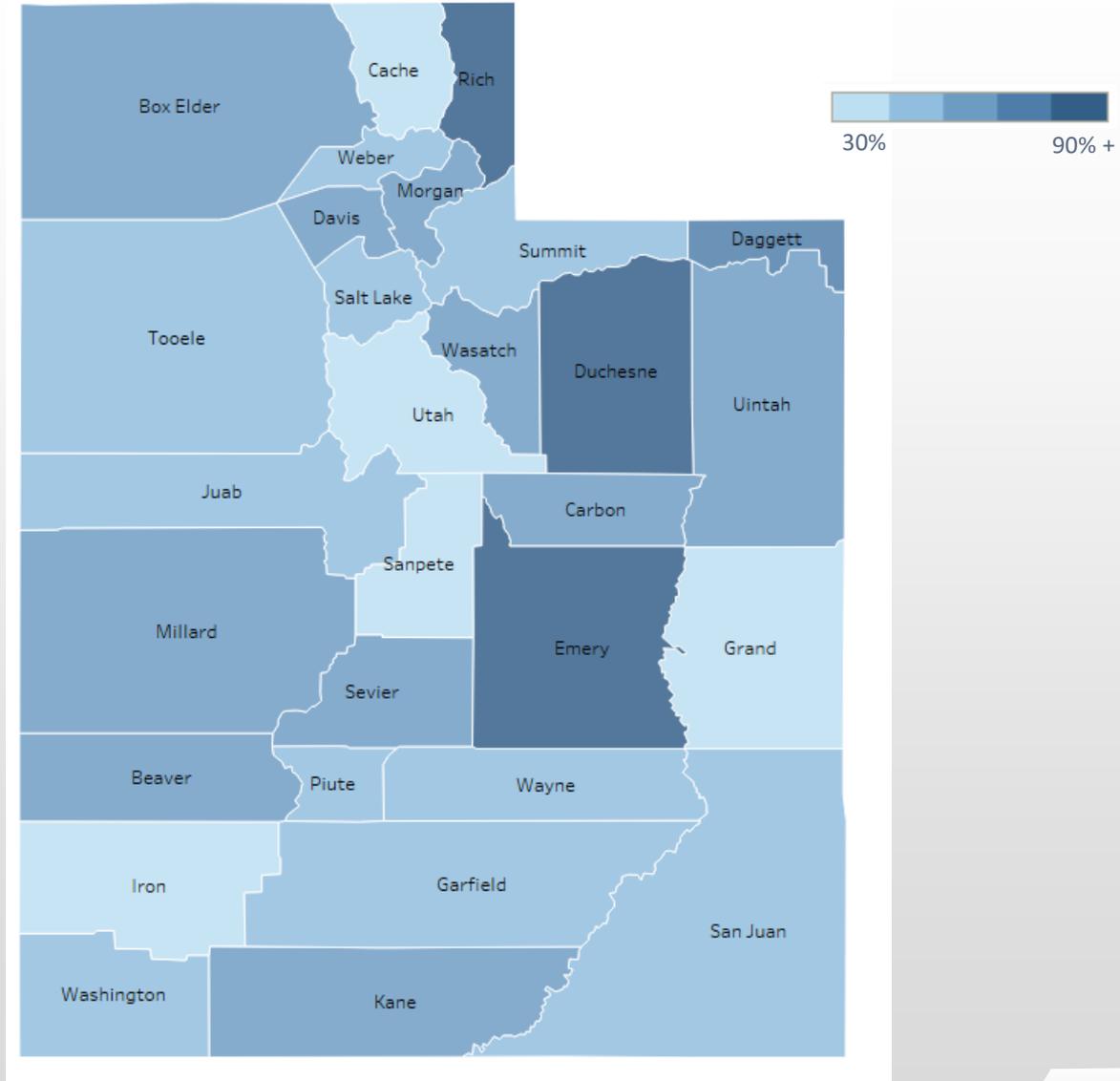
Percent of High School Graduates Just Out of High School Going Directly to College, 2016



Source: Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2016; NCES, IPEDS Fall 2016 Residency and Migration File; ef2016c Provisional Release Data File.
 Note: Actual high school graduate numbers for 2016 not available from NCES Common Core of Data. WICHE High School Graduate Projections for 2016 substituted.



2017 Participation Rates by County



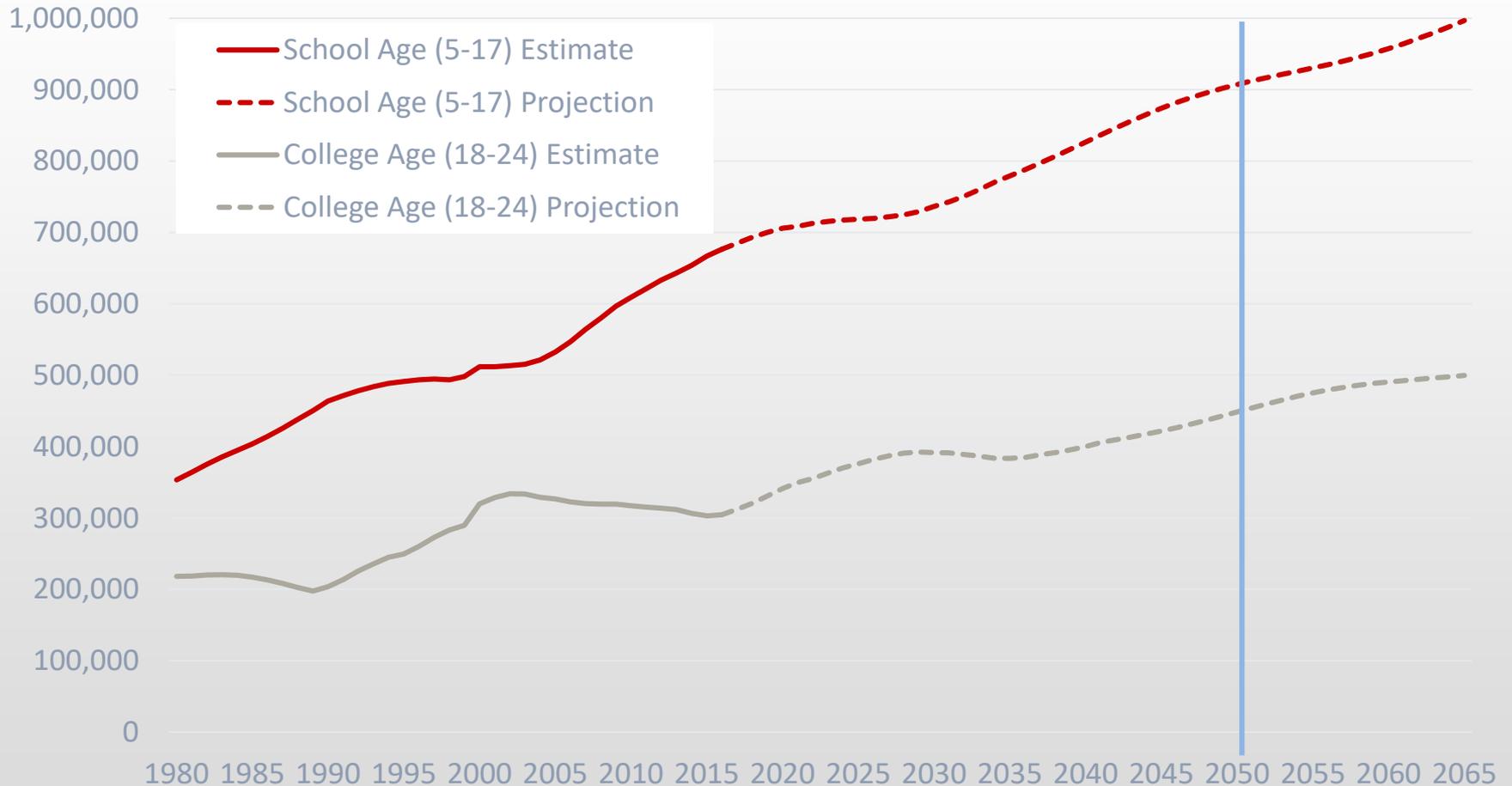
Source: USHE - All Undergraduates; Kem C. Gardner Policy Institute 2015-2065 State and County Projections ((18 YO + 19-24 YO) for 2017)



Accommodating Growth in Population

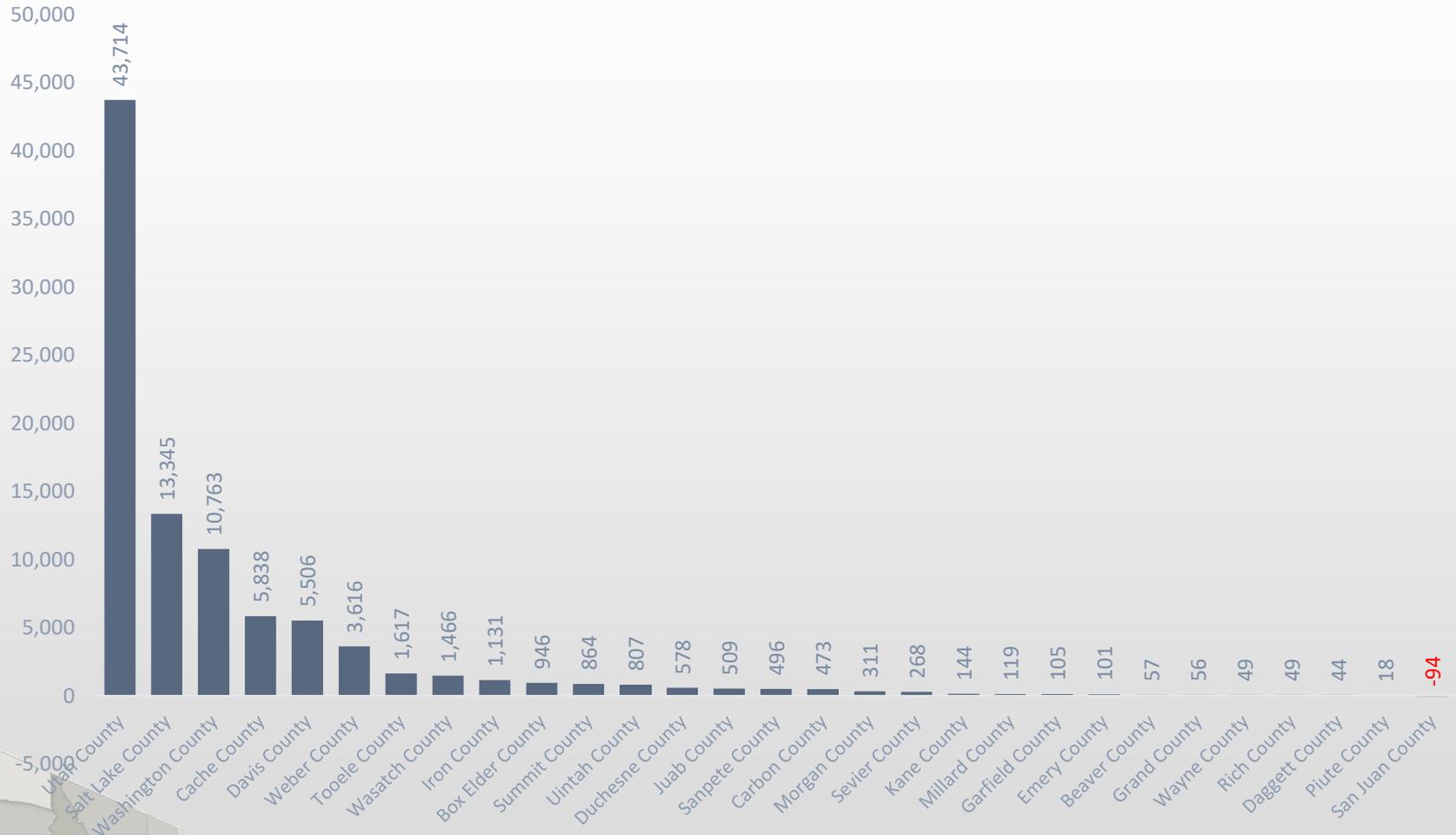


School Age (5-17) and College Age (18-24) Population Estimates and Projections: Utah



Sources: 1980-1989: Governor's Office of Planning and Budget, Population estimates by sex and single year of age: 1980-1989; 1990 to 2009: Governor's Office of Management and Budget, 2012 Baseline Projections; 2010 to 2065: Kem C. Gardner Policy Institute 2015-2065 State and County Projections

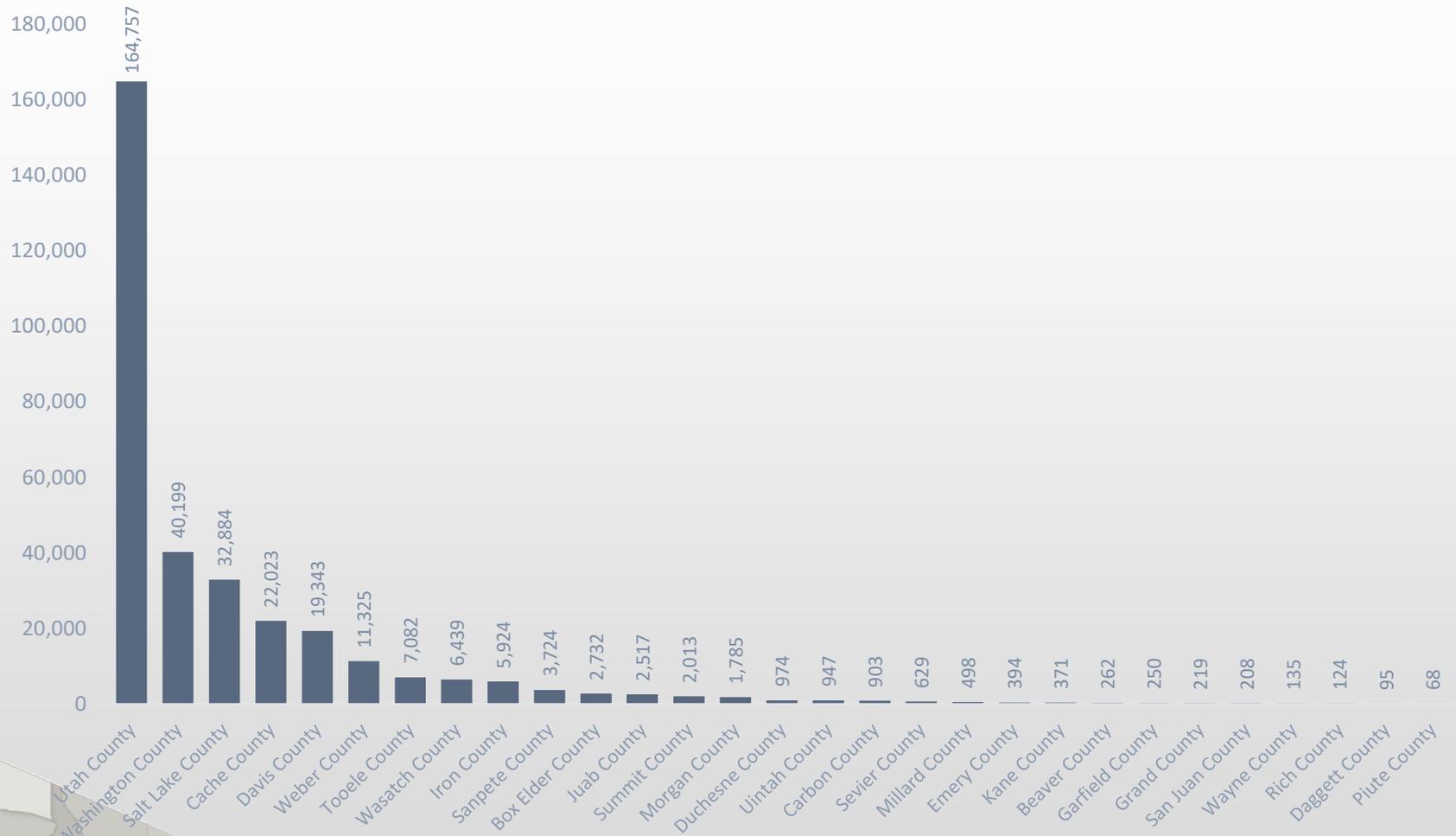
Difference in Population Aged 19-24 by County, 2020-2050



Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections



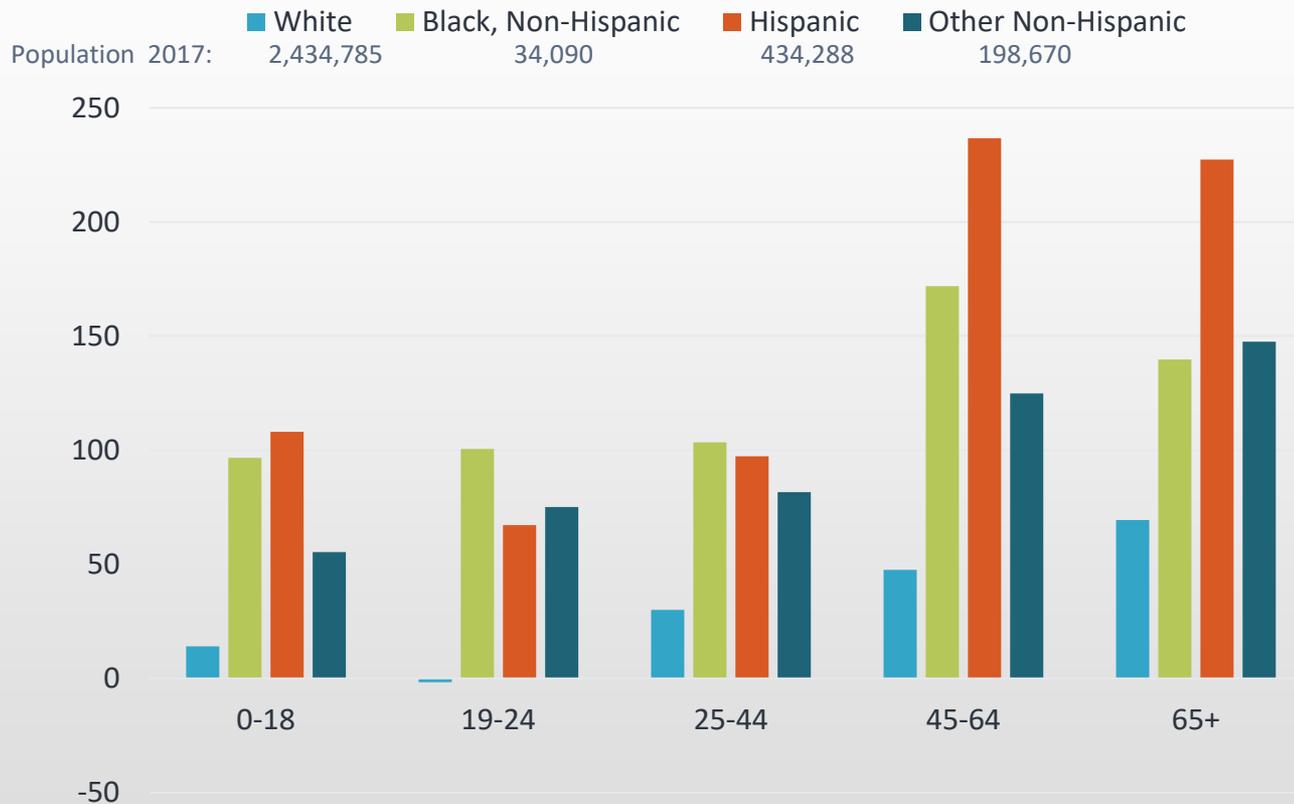
Difference in Population Aged 25-44 by County, 2020-2050



Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections



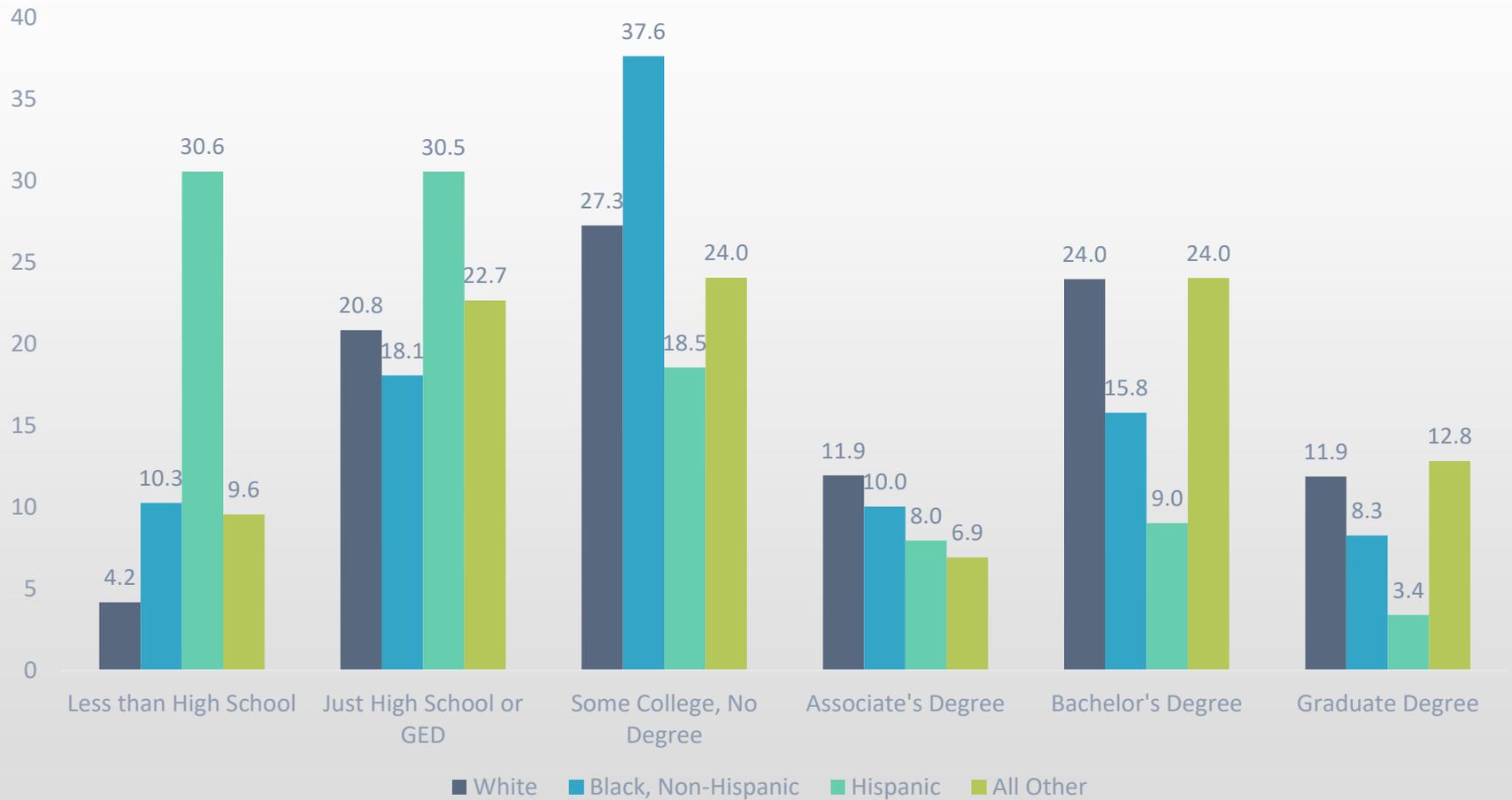
Percent Change in Utah Population by Race, 2000 - 2017



Source: U.S. Census Bureau, 2000 Census; Summary File 1; U.S. Census Bureau, Population Division; SC-EST2017-ALLDATA6: Annual State Resident Population Estimates for 6 Race Groups (5 Race Alone Groups and Two or More Races) by Age, Sex, and Hispanic Origin: April 1, 2010 to July 1, 2017 File: 7/1/2017 State Characteristics Population Estimates Release Date: June 2018



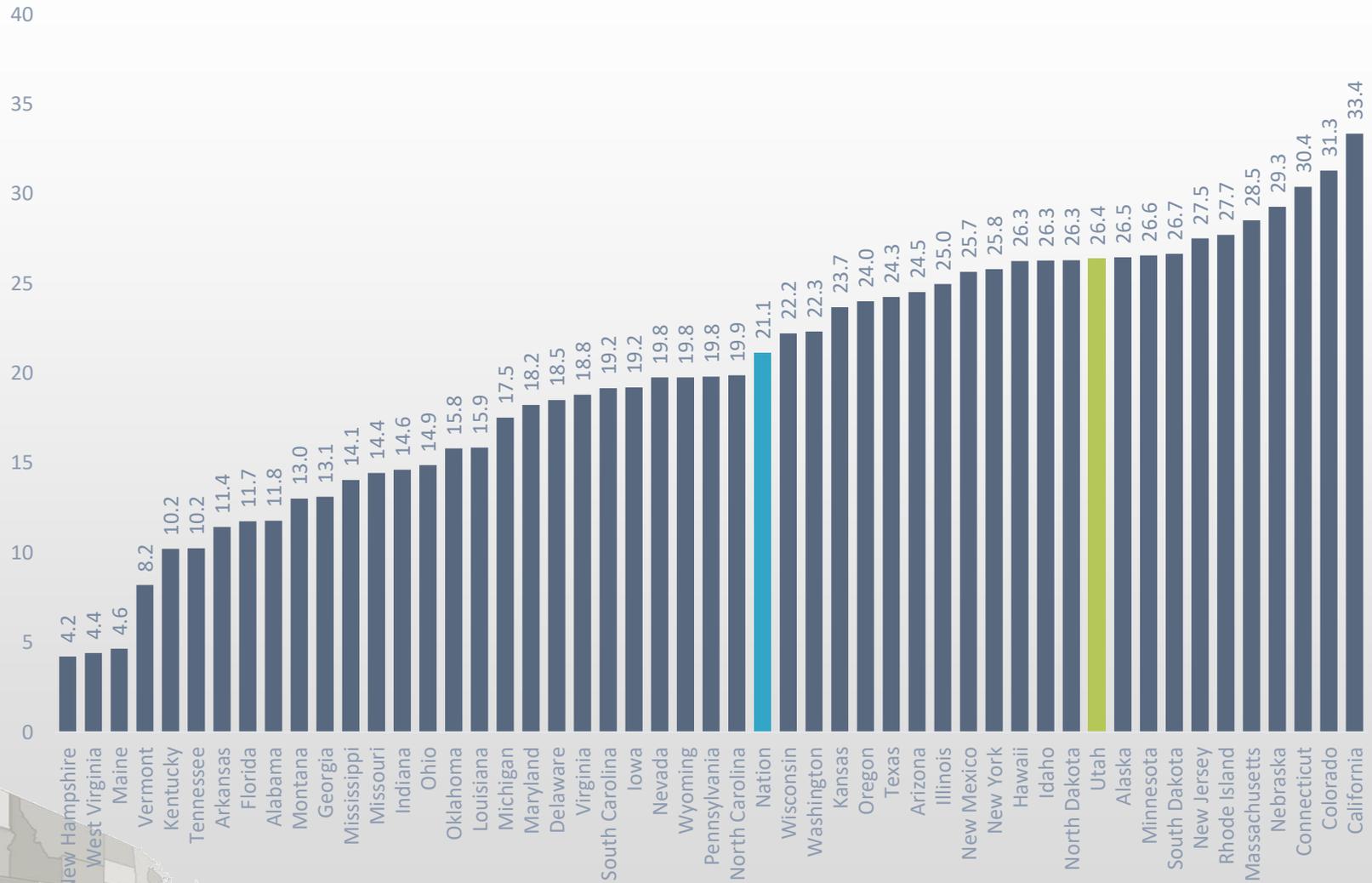
Educational Attainment of Adults Aged 25-64 by Race, Utah, 2016



Source: U.S. Census Bureau, 2016 American Community Survey One-Year Public Use Microdata Sample.



Difference in College Attainment Between Whites and Underrepresented Minorities, Ages 25-64, 2016

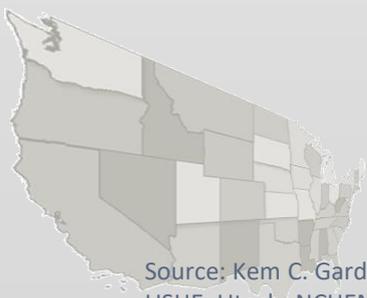


Source: U.S. Census Bureau, 2016 American Community Survey One-Year Public Use Microdata Sample.



Accommodating Projected Population Increase by 2050 – Assuming “Business as Usual”

Institution	Student Delta, 2016 - 2050
University of Utah	3,811
Utah State University*	5,291
Weber State University	5,251
Southern Utah University	1,902
Snow College	1,308
Dixie State University	4,734
Utah Valley University	13,767
Salt Lake Community College	5,346
Bridgerland Technical College	822
Davis Technical College	656
Dixie Technical College	978
Mountainland Technical College	1,069
Ogden-Weber Technical College	647
Southwest Technical College	216
Tooele Technical College	126
Uintah Basin Technical College	829
Total	



Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections;
USHE; Utech; NCHEMS Calculation



Responding to Employer Needs



Percent of Total Gross State Product by Industry and Comparison to U.S.

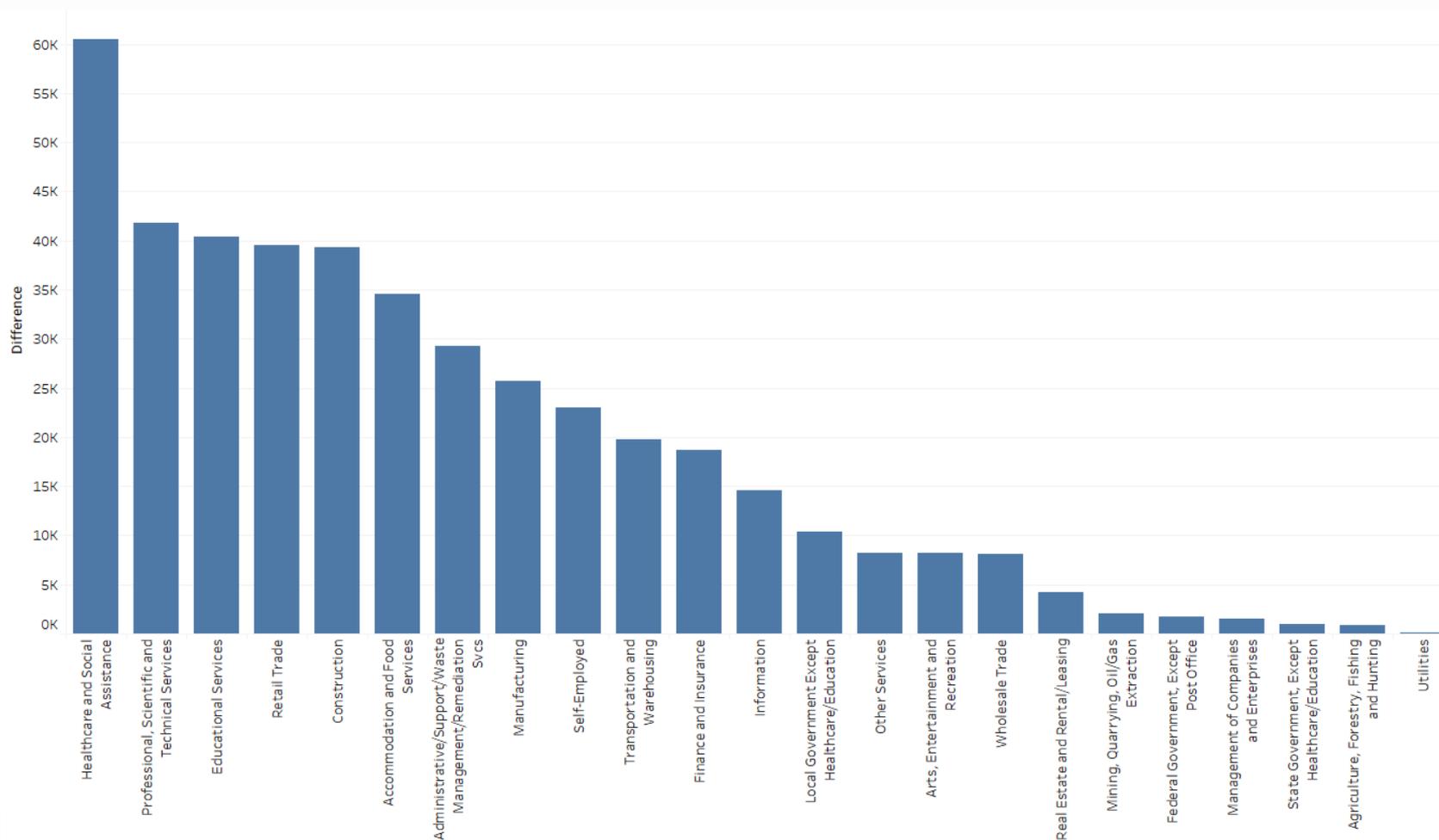
■ Utah 2006 ■ Utah 2016 ■ US 2016



Source: Bureau of Economic Analysis.



Projected Increase in Employment by Industry in 2026, Utah

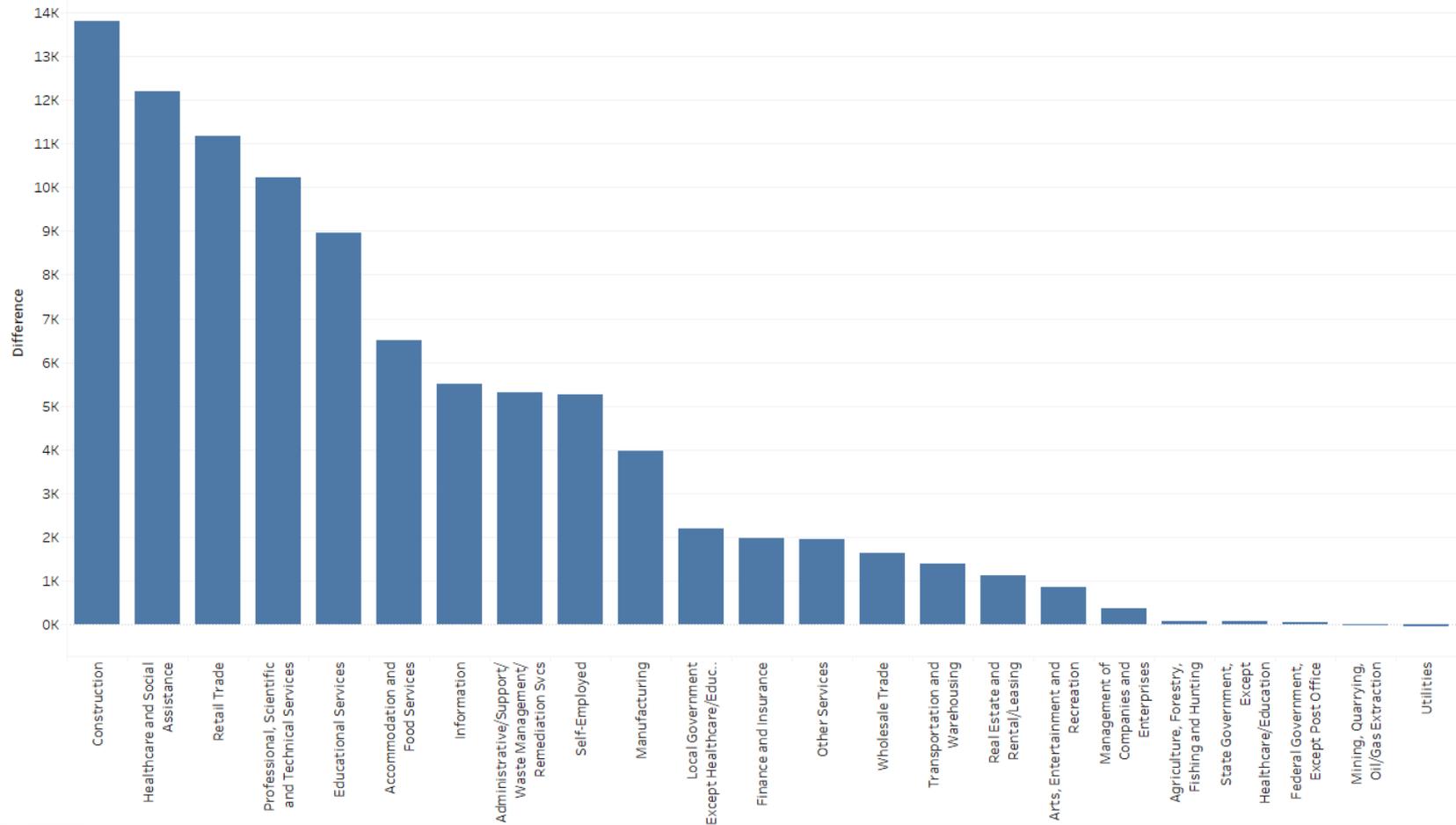


Source: <https://jobs.utah.gov/wi/data/library/employment/indprojections.html>



Projected Increase in Employment by Industry in 2026

Provo-Orem MSA



Source: <https://jobs.utah.gov/wi/data/library/employment/indprojections.html>



Utah Average Annual Employment by Major Industry Group and Number of Workers with a College Degree – 2012-16

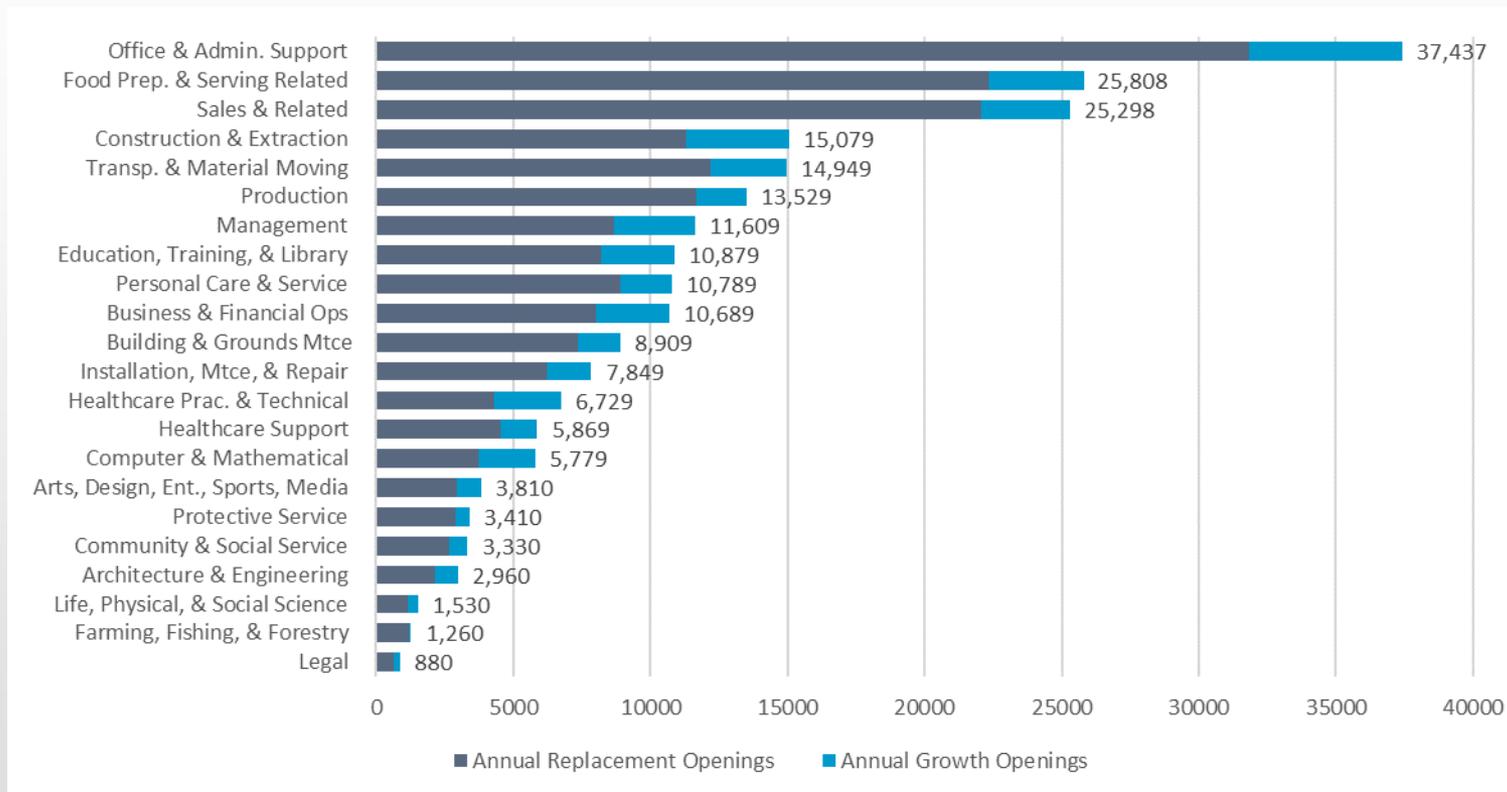
Industry Title	Total Number Employed	Number Employed with a College Credential	Percent with a College Credential
Manufacturing	120,949	41459	34.3
Professional, Scientific, Management, Administrative, Waste Management Services	119,248	65971	55.3
Educational	110,397	80246	72.7
Retail Trade	107,909	32484	30.1
Health	104,599	66963	64.0
Finance, Insurance, Real Estate, Rental and Leasing	71,224	37155	52.2
Construction	70,672	15323	21.7
Arts, Entertainment, Recreation, Accommodation, Food Services	63,682	17794	27.9
Public Administration	60,417	29994	49.6
Transportation and Warehousing	45,274	13505	29.8
Other Services	37,032	14136	38.2
Wholesale Trade	29,103	11802	40.6
Information	24,115	12650	52.5
Mining	13,413	3291	24.5
Social Services	12,524	6433	51.4
Utilities	8,560	3365	39.3
Agriculture, Forestry, Fishing, and Hunting	7,334	2281	31.1
Military	2,882	1473	51.1
Total	1,009,334	456,325	45.2

Source: U.S. Census Bureau, 2012-16 American Community Survey (ACS) Public Use Microdata Sample (PUMS) File.



Average Annual Openings Through 2026 by Occupation

Utah

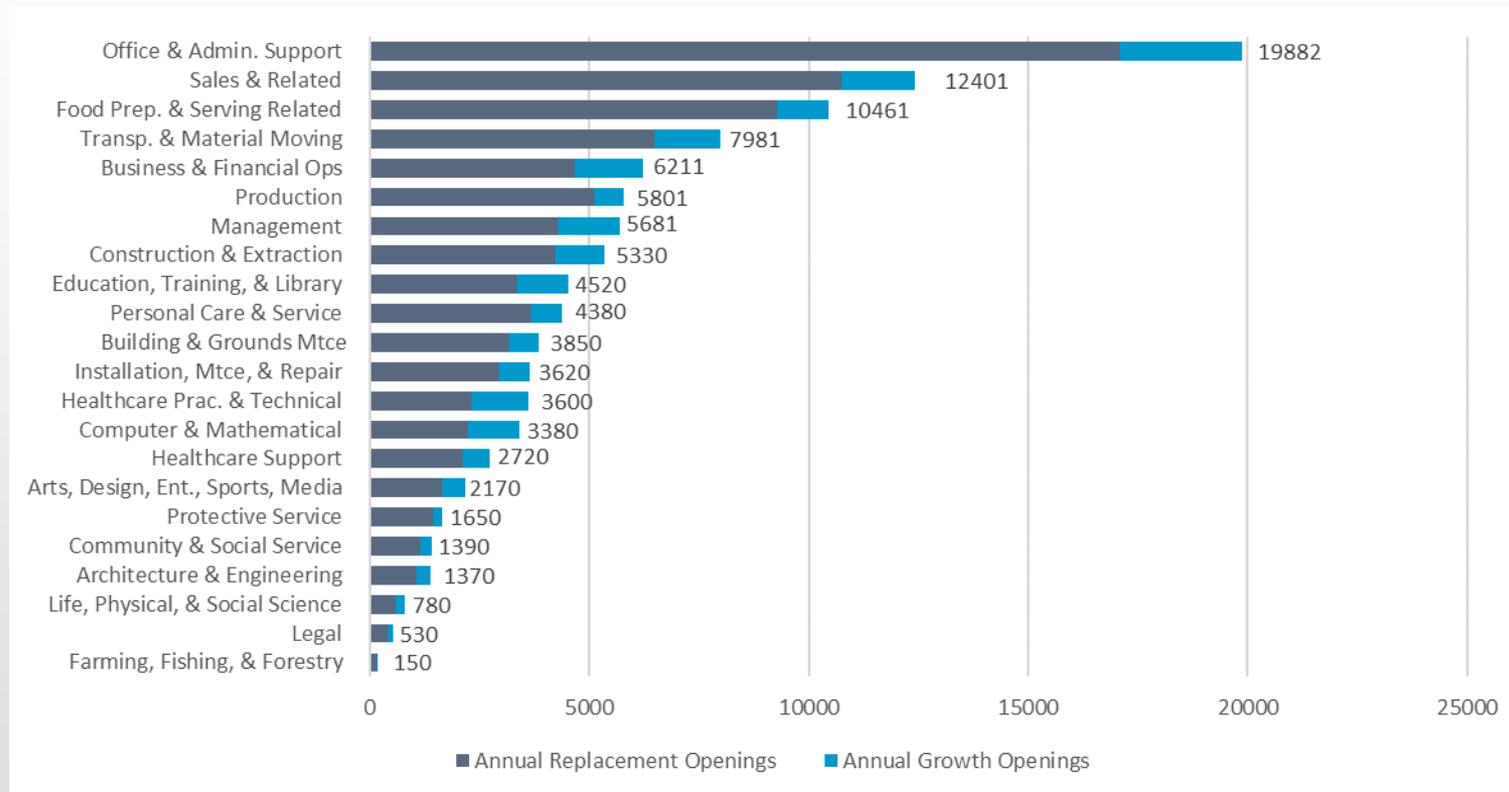


Utah Department of Workforce Services, Occupational Projections 2016-26;
<https://jobs.utah.gov/wi/data/library/employment/occprojections/occprojttables.html>
 U.S. Census Bureau, 2005-09 through 2013-17 American Community Survey Five-Year Estimates (for reallocating occupational projections into revised regions). Note: Figures may not add to total due to rounding in source data.



Average Annual Openings Through 2026 by Occupation

Wasatch Front South Region

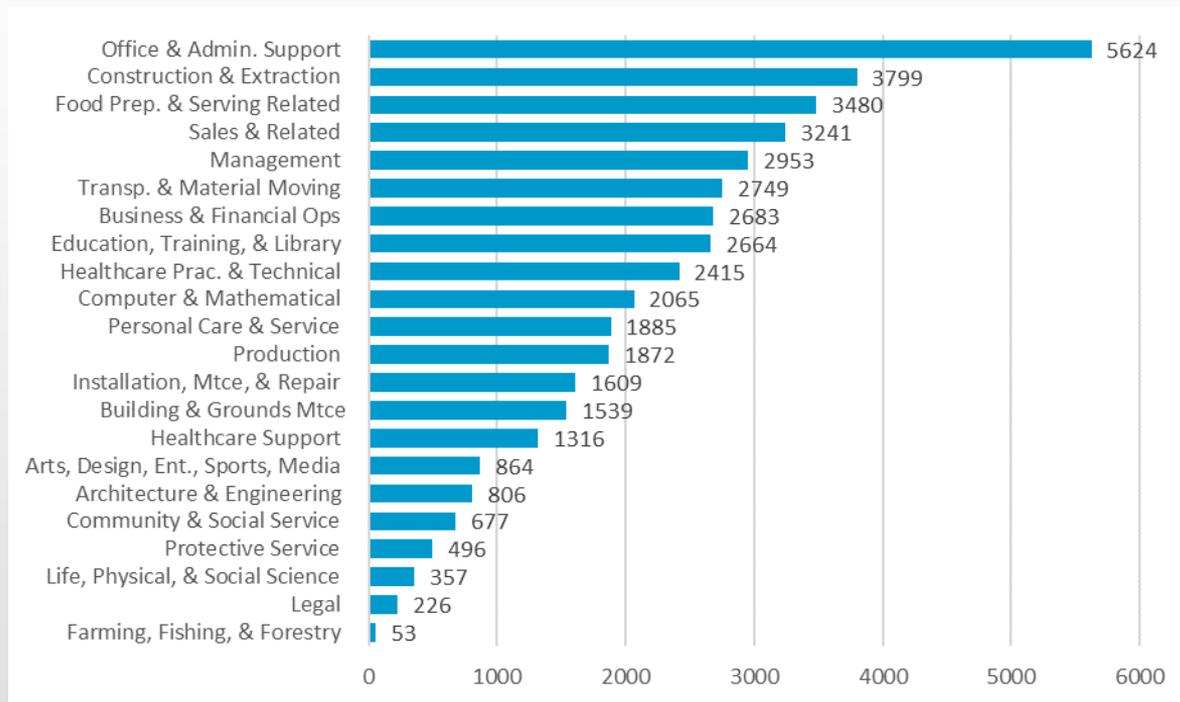


Utah Department of Workforce Services, Occupational Projections 2016-26;
<https://jobs.utah.gov/wi/data/library/employment/occprojections/occprojttables.html>
 U.S. Census Bureau, 2005-09 through 2013-17 American Community Survey Five-Year Estimates (for reallocating occupational projections into revised regions). Note: Figures may not add to total due to rounding in source data.



Average Annual Growth Openings Through 2026 by Occupation

Utah



Utah Department of Workforce Services, Occupational Projections 2016-26;

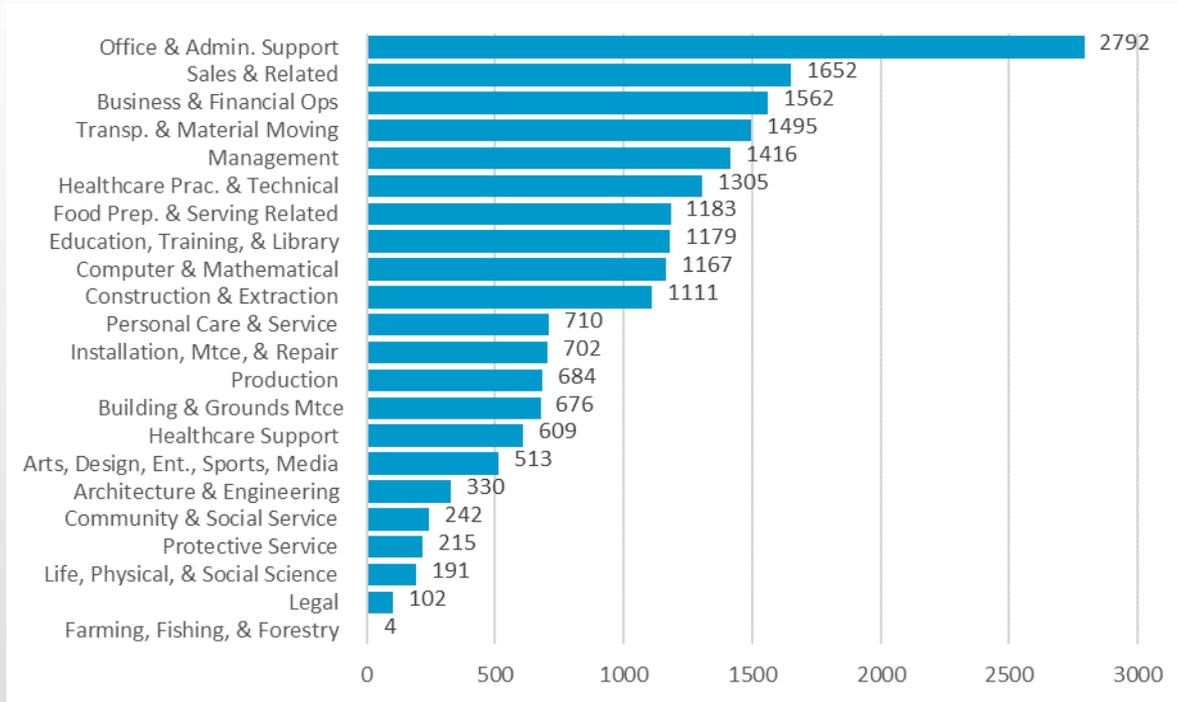
<https://jobs.utah.gov/wi/data/library/employment/occprojections/occprojttables.html>

U.S. Census Bureau, 2005-09 through 2013-17 American Community Survey Five-Year Estimates (for reallocating occupational projections into revised regions). Note: Figures may not add to total due to rounding in source data.



Average Annual Growth Openings Through 2026 by Occupation

Wasatch Front South Region



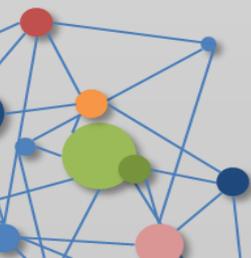
Utah Department of Workforce Services, Occupational Projections 2016-26;

<https://jobs.utah.gov/wi/data/library/employment/occprojections/occprojttables.html>

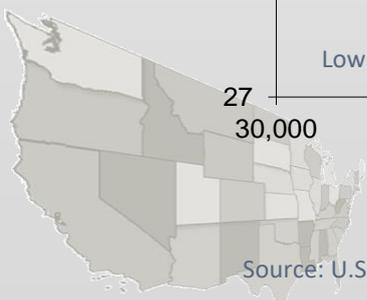
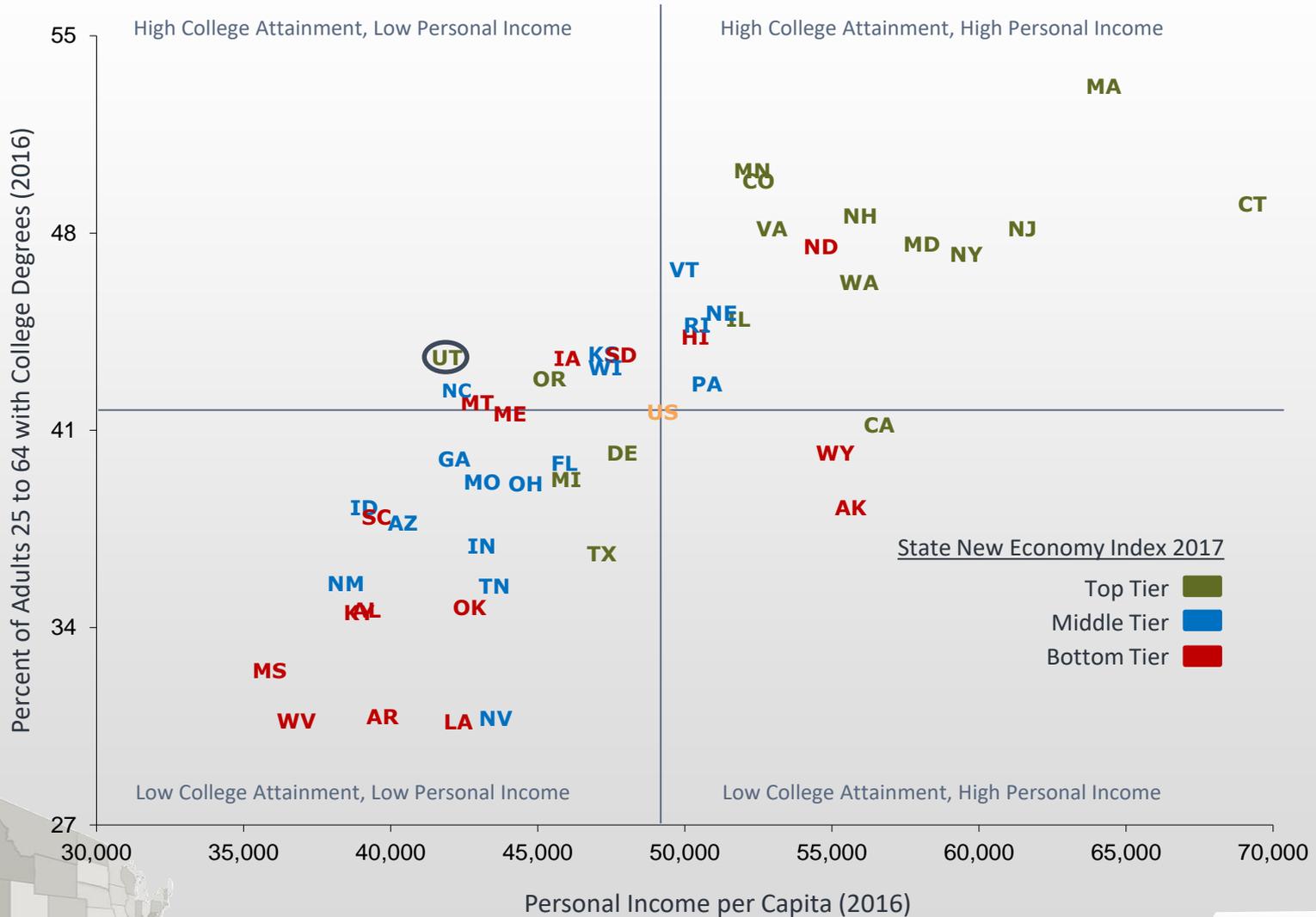
U.S. Census Bureau, 2005-09 through 2013-17 American Community Survey Five-Year Estimates (for reallocating occupational projections into revised regions). Note: Figures may not add to total due to rounding in source data.



Expanding & Diversifying the Economy and Creating High-Paying Jobs



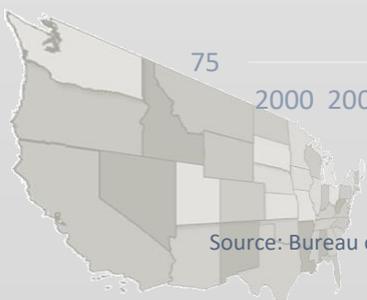
The Relationship Between Educational Attainment, Personal Income, and the State New Economy Index



Source: U.S. Census Bureau, American Community Survey; Bureau of Economic Analysis; ITIF



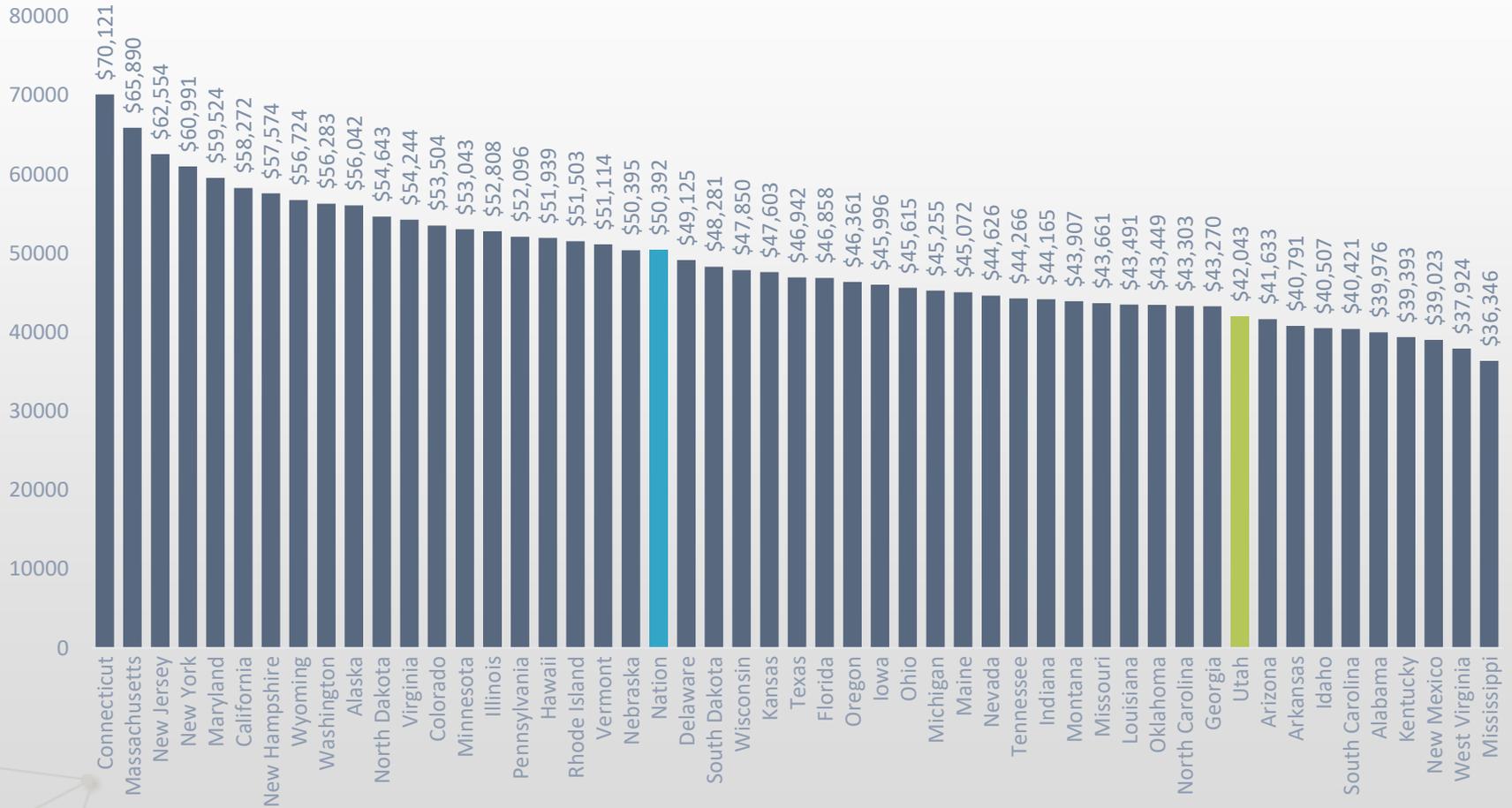
Trend in Per Capita Income as a Percent of US Average, Utah



Source: Bureau of Economic Analysis



Per Capita Income by State, 2017

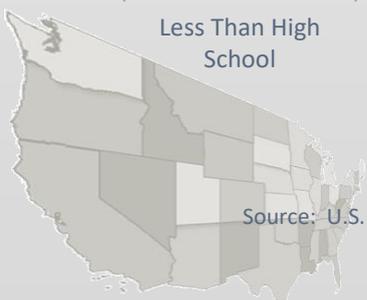
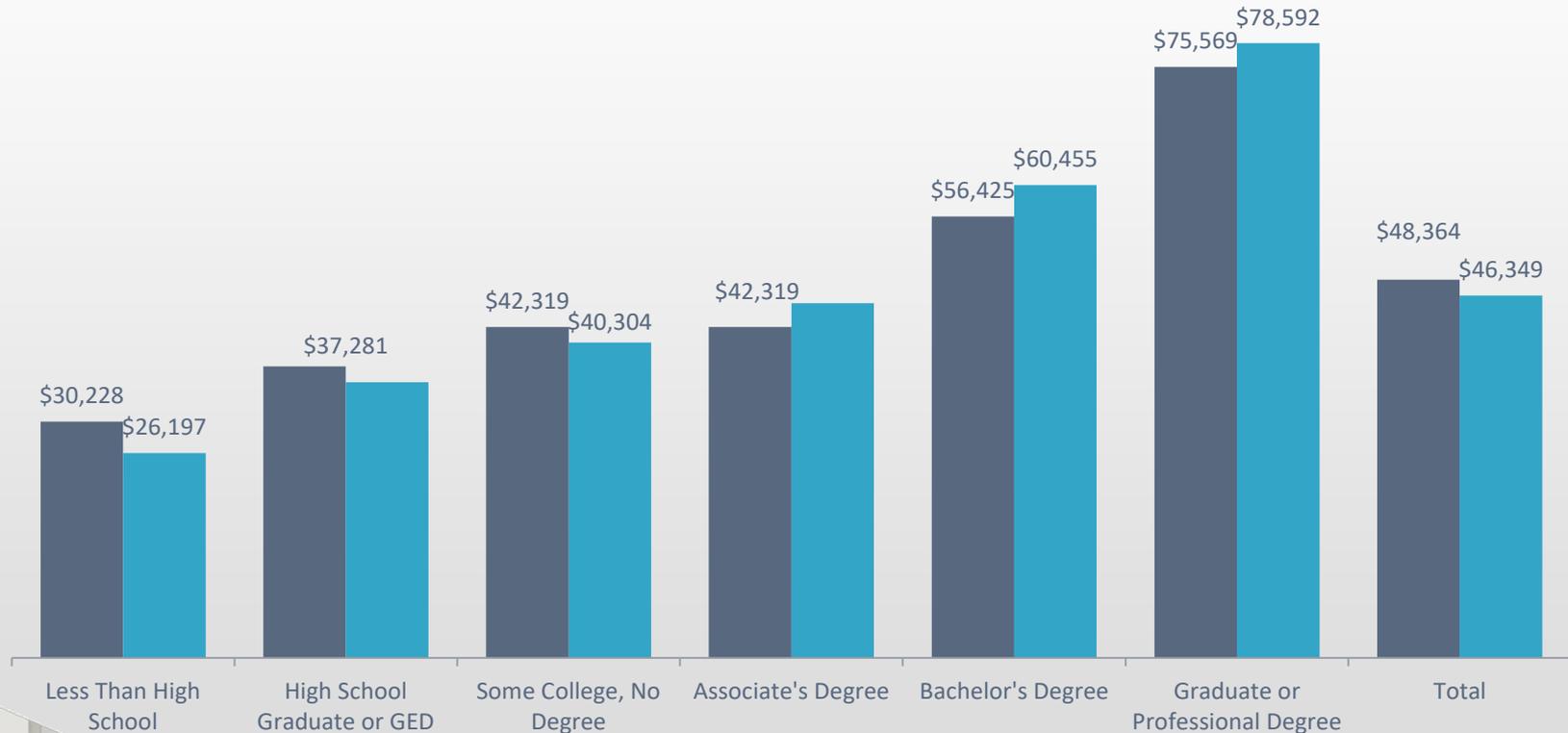


Source: Bureau of Economic Analysis



Median Annual Wages for Employed Workers Aged 25 to 64 - by Level of Education (2016)

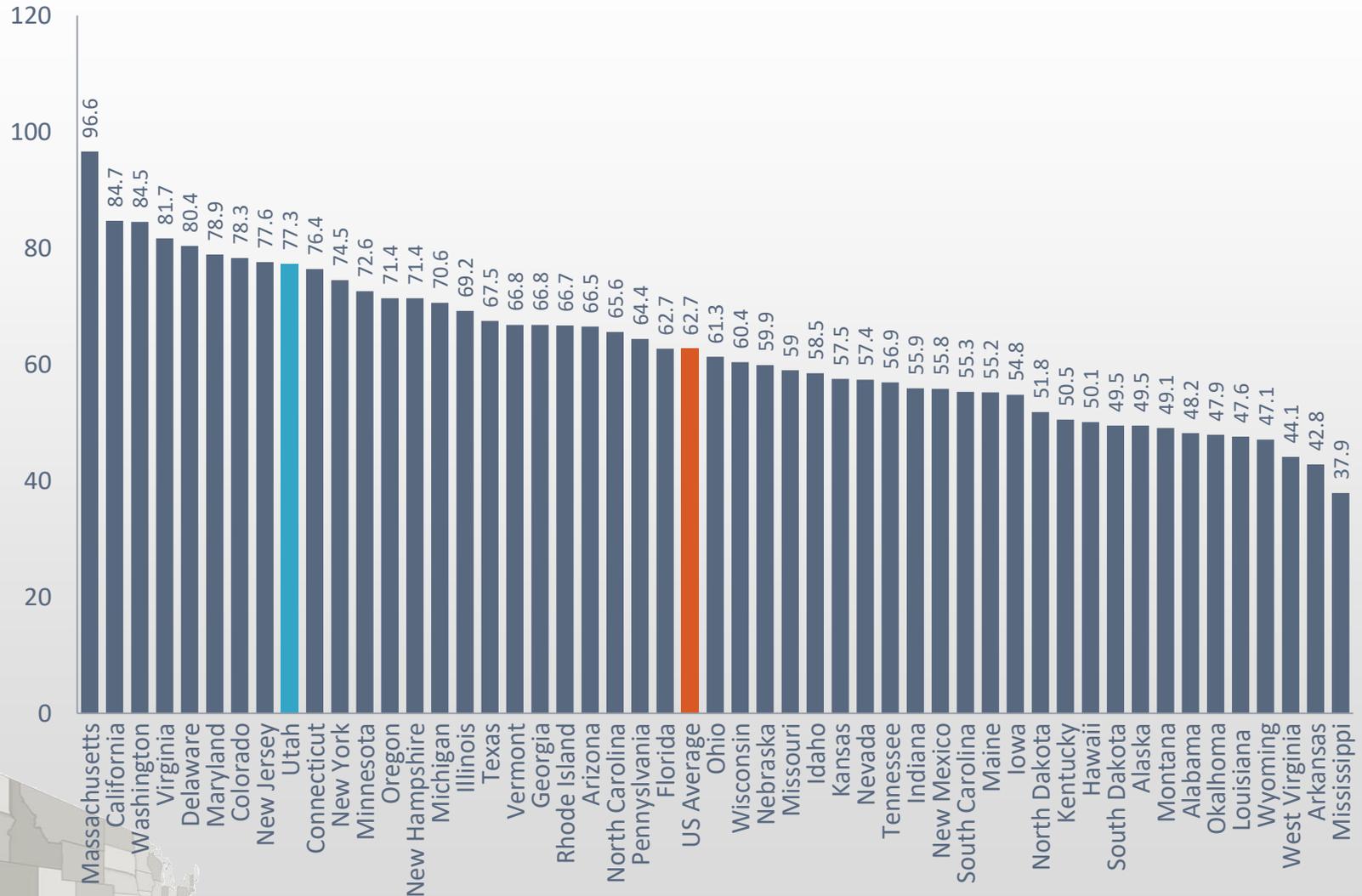
■ Utah ■ Nation



Source: U.S. Census Bureau, 2016 American Community Survey One-Year Public Use Microdata Sample.



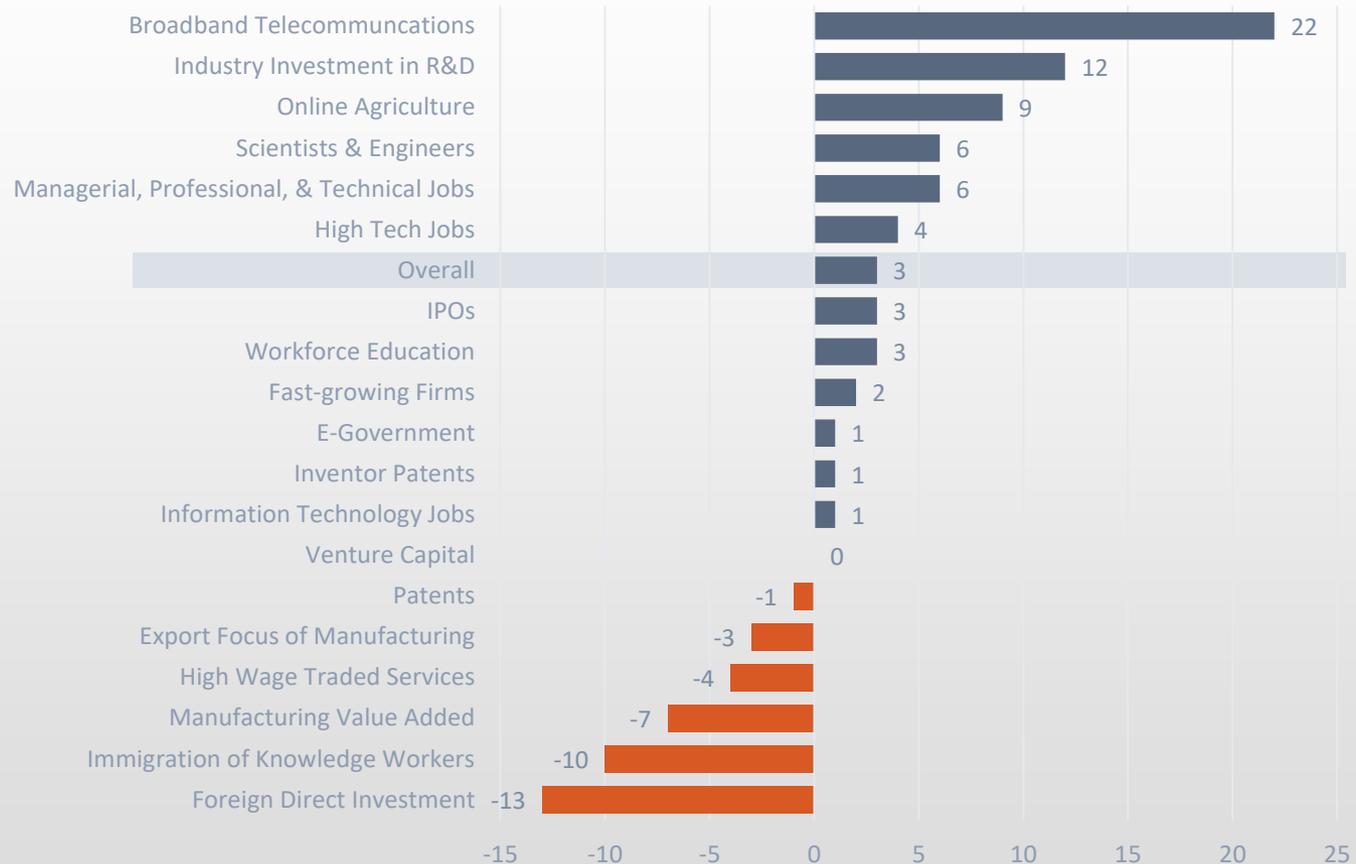
2017 State New Economy Index – Overall Index Scores



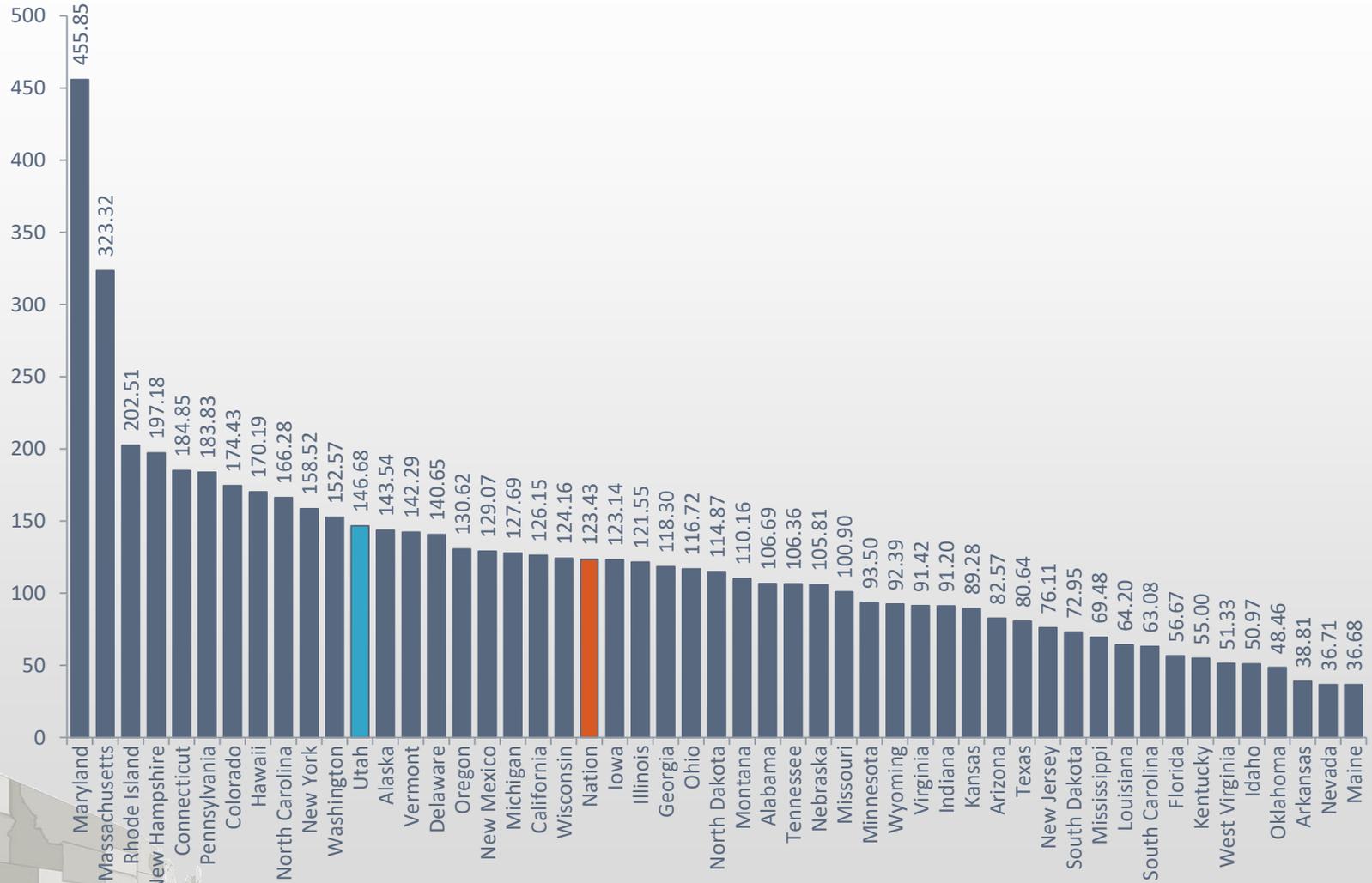
Source: ITIF 2017 States New Economy Index



Positions Gained or Lost in the New Economy Index Rankings 2007-2017, Utah



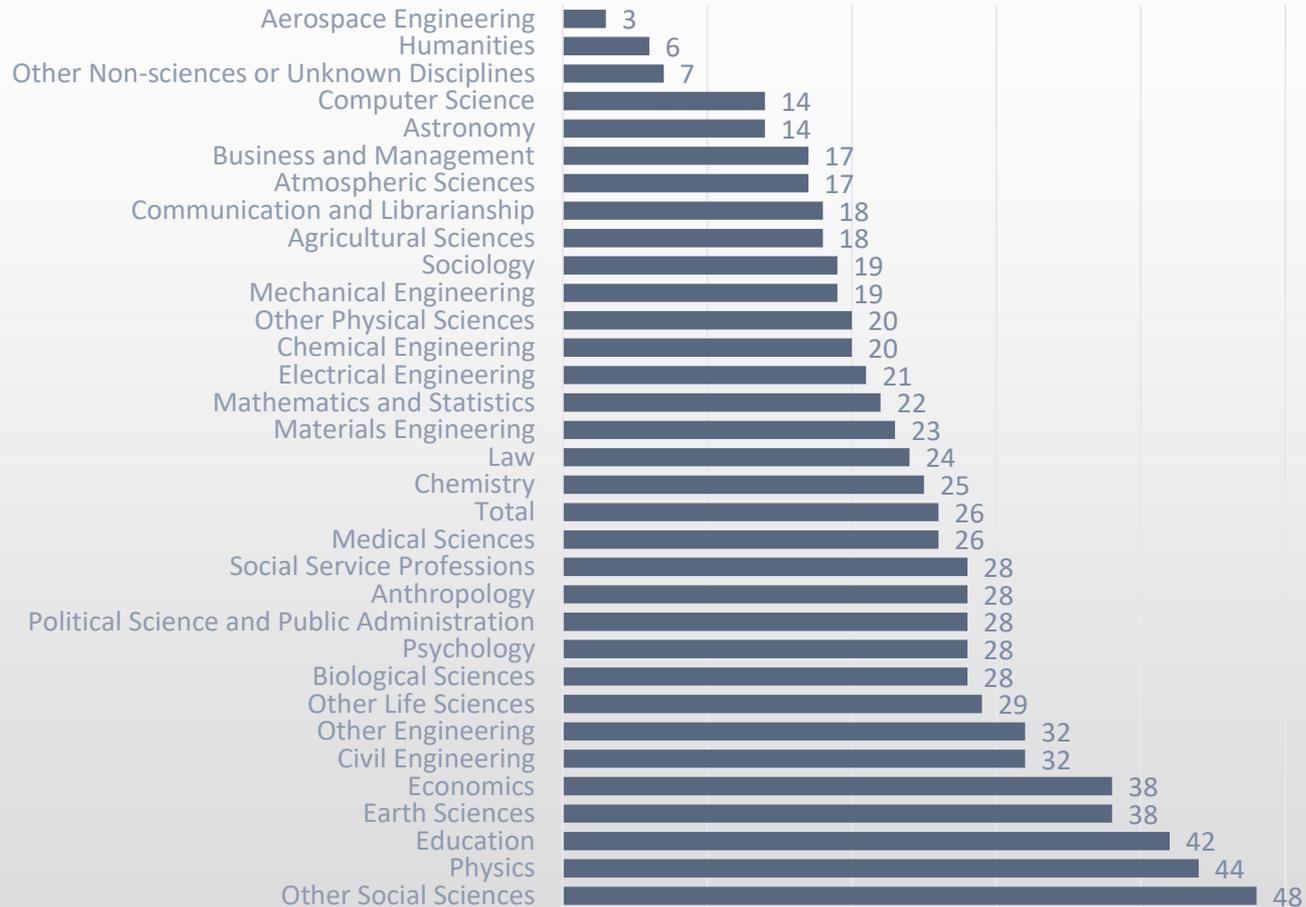
Federally Financed R&D Expenditures Per Capita, State Totals, 2013



Source: National Science Foundation; WebCASPAR



R&D By Field, Utah's Rank



Source: National Science Foundation; WebCASPAR



Preliminary Findings and Observations

1. Most of the state's population growth will be in Utah County – lesser amount in Salt Lake and Washington Counties
2. Per capita income – and wages of more highly educated workers are well below the national average
3. Greatest number of job openings are in the following occupations:
 - Office & administrative support
 - Food preparation and serving
 - Sales
 - Construction & extraction
 - Transportation & materials movingThese are largely openings for middle skills jobs
4. Greatest job growth projected in the following occupations
 - Office & administrative support
 - Food preparation and serving
 - Sales
 - Construction & extraction
 - Management
5. Utah has an aggressive attainment goal – 66% by 2020→2025
 - Not apparent that it is driving policy
 - No guidance as to split between baccalaureate and sub-baccalaureate
 - Achieving goal will require
 - Improving college participation
 - Successfully serving many more 25-44 year-olds



Emerging Goals – Planning Priorities

- Refine/better specify statewide attainment goals, sub-goals
- Creating capacity to meet demand, especially in Utah County
- Expand economy (create jobs) in ways that
 - Move per capita income close to US average
 - Ensure that highly educated workers can earn competitive incomes
- Create a higher education system responsive to workforce demands and other needs of the state
 - Middle skills jobs
 - Retraining workers displaced by technology
- Maintaining affordability, according to a comprehensive definition
- Delivering broad array of programs to less populated parts of the state
- Meeting the attainment goal – what mix of
 - Baccalaureate
 - Sub-baccalaureate



Specific Implementation Issues

- Community college functions
 - Continue dual missions?
 - Separate community college function?
 - A mixture?
- Sharpening missions – creating centers of expertise
- Creating distance ed capacity
 - Institutional choice vs.
 - A statewide strategy
- Responsibility for serving underserved parts of the state
- Creating the required additional capacity – what's the appropriate mix of
 - Bricks & Mortar
 - Alternative delivery
 - Productivity improvements



Awards

	2006-07	2011-12	2016-17
Bachelors			
Dixie State University	134	483	724
Southern Utah University	886	925	1,084
Utah Valley University	1,479	2,612	2,940
Weber State University	1,940	2,157	2,458
Total	4,439	6,177	7,206



Awards

Associates & Certificates

	2006-07			2011-12			2016-17		
	Assoc- iates	Certif- icates	Total	Assoc- iates	Certif- icates	Total	Assoc- iates	Certif- icates	Total
Dixie State University	864	319	1,182	1,131	437	1,568	923	288	1,211
Southern Utah University	168	10	178	352	15	367	641	113	754
Utah Valley University	1,781	27	1,808	1,831	92	1,923	1,784	198	1,982
Weber State University	1,630	51	1,681	1,997	50	2,047	2,361	86	2,447
Total	4,443	407	4,850	5,311	594	5,905	5,709	685	6,394

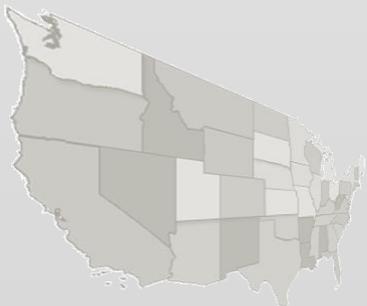
Associates & Certificates in Vocational Fields

	2006-07			2011-12			2016-17		
	Assoc- iates	Certif- icates	Total	Assoc- iates	Certif- icates	Total	Assoc- iates	Certif- icates	Total
Dixie State University	180	318	498	236	437	673	183	288	471
Southern Utah University	13	5	18	19	4	23	44	1	45
Utah Valley University	611	18	629	604	87	691	578	182	760
Weber State University	673	45	718	808	45	853	965	70	1035
Total	1477	386	1863	1667	573	2240	1770	541	2311



Percent of Awards in Vocational Fields (Bachelors, Associates, and Certificates)

	2006-07	2011-12	2016-17
Dixie State University	37.8%	32.8%	24.3%
Southern Utah University	1.7%	1.8%	2.4%
Utah Valley University	19.1%	15.2%	15.4%
Weber State University	19.8%	20.3%	21.1%



Specific Implementation Issues (continued)

- Governance
 - Structure
 - How many governing boards?
 - Maintain the current structure – USHE and UTECH?
 - Combine the two?
 - Should there be a coordinating entity to
 - Ensure attention to state needs?
 - Carry on the work of the planning commission?
 - Functions
 - Planning
 - Mission approval
 - Program approval role
 - Resource allocation



Allocation of Decision Authority

Function	Governor	Legislature	Coordinating Commission	Governing Board	Institutions	Service Corp
1. Statewide Goals	?	?	?			
2. Approve Missions		X	?			
3. Program Approval			?	?	X	
4. Hire CEOs				X		
5. Strategic Finance			?	X		
6. Allocate \$		X				
7. Tuition Policy			?	X		
8. Student Financial Aid Policy		X	?			
9. Data Collection and Analysis			?	X	X	
10. Fund-raise					X	
11. Collective Bargaining	--	--	--	--	--	--
12. Legal				X		
13. Government Relations				X		
14. Manage Student Financial Aid			?	X	X	?
15. Operations					X	?
16. Academic Policy				X	X	
17. Accountability			?	X		
18. Instruction					X	
19. Research					X	
20. Public Service					X	
21. Direct Student Service Support					X	



Specific Implementation Issues (continued)

- Funding – paying for goal attainment
 - Appropriate shares to be borne by
 - Students
 - State
 - Maintaining affordability
 - Equity of funding for institutions



Next Steps

- Regional meetings
- Refine analyses – especially workforce needs and impacts on Higher Education
- Summarize findings/conclusions
- Draft recommendations



Regional Meetings

- April 17 Cedar City
- April 22 Logan
- April 23 Ogden
Moab
- April 24 Provo
Ephraim
- April 25 Draper/Tooele
Vernal
- April 26 Salt Lake City

